

# Scale business IT smarter

The lean EX guide for small business IT



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# Executive summary

Small and medium businesses face mounting pressures to meet employee expectations for seamless, consumer-like workplace experiences. At the same time, IT teams grapple with limited budgets, fragmented tools, and manual processes that hinder scalability. As these businesses grow, their IT operations often struggle to keep pace with rising complexity and service demands. Therefore, they need scalable IT solutions that deliver proactive, efficient, and AI-driven support to enable business growth while enhancing employee satisfaction.

This is where a lean employee experience strategy (lean EX) can prove transformative. Lean EX is a modern IT strategy designed to help small and commercial businesses streamline IT operations while maximizing value. Built on **five key pillars** – simplicity, automation, cost optimization, AI-powered assistance, and scalability – it tackles IT leaders' biggest challenges: complexity, inefficiency, cost constraints, and growth limitations.

This ebook explores how IT teams can leverage the lean EX strategy to **simplify, automate, optimize, and scale IT operations** while delivering a world-class employee experience.

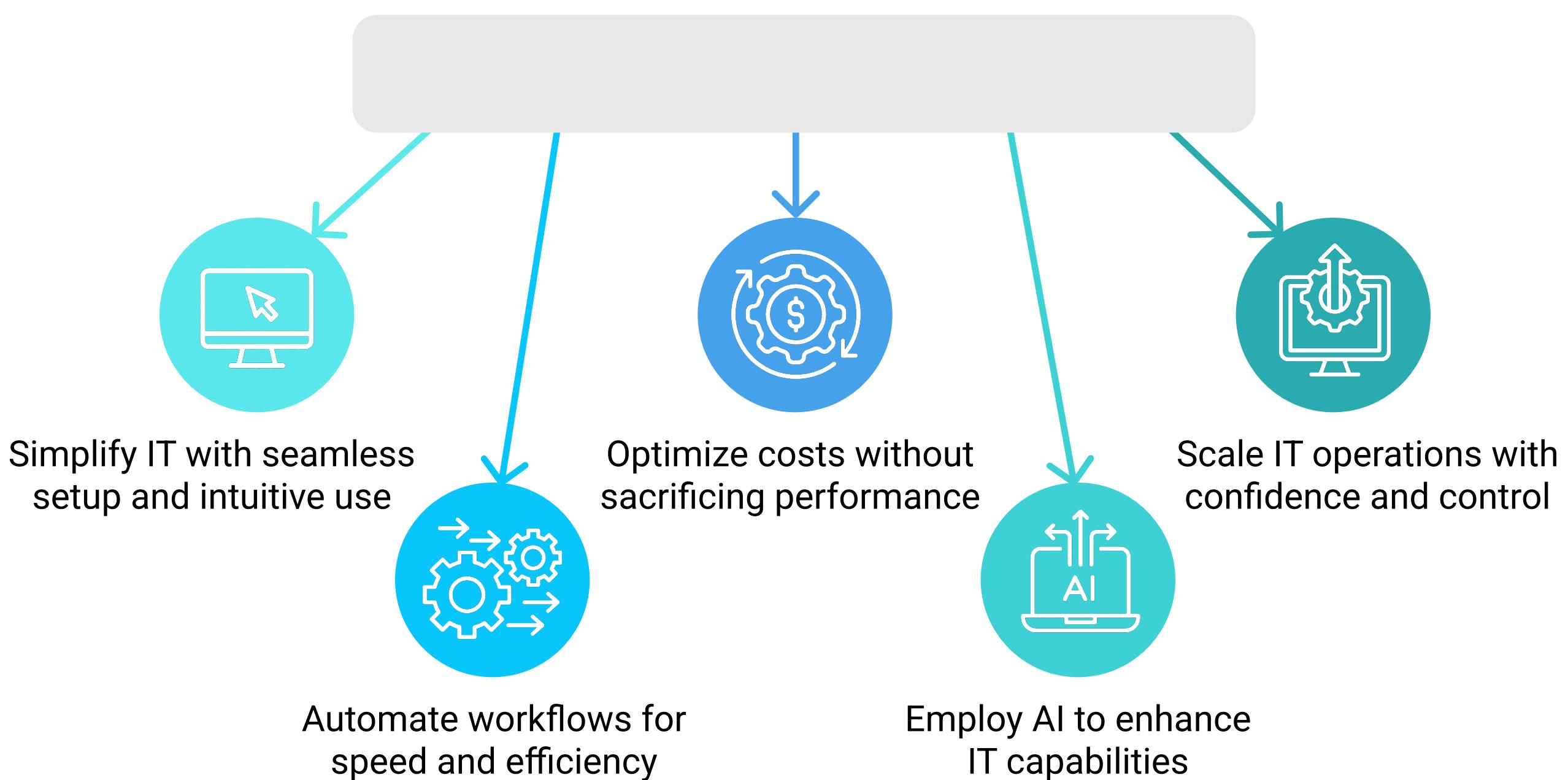
# Introduction

Operating and scaling a small or medium-sized business is no easy feat. Despite ambitious beginnings, only [22% of new businesses](#) manage to grow successfully. The roadblocks are clear: tight budgets, rising costs, ever-evolving technologies, and the lack of the right infrastructure and resources stand in the way of sustainable growth.

And when businesses prioritize employee experience (EX), it significantly improves the bottom line. Research consistently shows that companies with a strong EX [motivates employees, promotes creativity and collaboration, improves retention, and reduces risk aversion](#).

So, how can small and commercial businesses grow while delighting employees and slashing costs?

The key is empowering IT teams to become agents of growth, not just cost centers. This transformation is possible through the lean employee experience (lean EX), a modern IT strategy designed to maximize efficiency and business impact. Lean EX focuses on five key pillars — simplicity, automation, cost optimization, AI-powered assistance, and scalability — while keeping employee experience (EX) at the core. By using these elements in harmony, IT teams can create a sustainable, high-performance environment that fuels growth and innovation.



With AI at its core, lean EX is about scaling with intention — building businesses that are not only sustainable but also adaptive, resilient, and primed for growth.

Future success for small and commercial businesses isn't just about keeping up — it's about leading the way with a lean, agile IT strategy that turns technology into a true competitive advantage.

# Simplify IT with seamless setup and intuitive use

When IT service management (ITSM) platforms are built with simplicity in mind, IT teams can deploy and manage services without unnecessary complexity. The result? Faster adoption, reduced training time, and a smoother experience for both IT teams and employees. Businesses that prioritize **modern, user-friendly solutions**—with intuitive interfaces and seamless third-party integrations—report significant improvements in service management.

The easier a tool is to use, the quicker teams embrace it. User-friendly, uncomplicated ITSM platforms minimize touchpoints, making adoption effortless and boosting employee productivity. When IT staff spend less time struggling with clunky systems, they can focus on delivering high-quality support—leading to increased efficiency, higher satisfaction levels, and faster realization of ROI.

## Why simplicity matters

The numbers speak for themselves. According to Harvard Business Review Analytic Services, [68% responded that their organization experiences high level of complexity.](#)

So, what should IT leaders look for in an intuitive, scalable ITSM platform?

Here are the must-have features:

- **Simple, modern UI:** A clean, uncluttered interface with a logical flow to minimize confusion and enhance usability
- **Rapid deployment:** Plug-and-play configurations that get IT teams up and running in no time
- **Contextual help:** In-app guidance, tool tips, and AI-powered recommendations to reduce the need for external support
- **Customization options:** The flexibility to tailor workflows, dashboards, and automation without unnecessary complexity
- **Unified portal:** A centralized platform that consolidates IT issues, whether they originate via email, chat, or self-service portals

- **Minimal training:** No-code/low-code workflows that allow users to get up to speed quickly with minimal hand-holding
- **Cross-platform compatibility:** Support for multiple devices and operating systems, enabling remote work and greater flexibility

Continuous improvement: Regular updates based on user feedback to ensure the system evolves with business needs.

## The bottom line

The focus on simplicity and usability isn't just about making life easier for IT—it's about driving real business impact. A solution that is easy to adopt, quick to deploy, and simple to navigate translates to happier employees, higher productivity, and a faster return on investment.

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We were looking at solutions such as ServiceNow and Cherwell. But Freshservice was the easiest with its drag-drop automation, and we loved its affordability.

**Alyse Howcroft**

**Service Delivery Analyst, Jeffco Public Schools**

# Automate workflows for speed and efficiency

For small and growing businesses, IT service management can often feel like a never-ending cycle of troubleshooting, ticket management, and routine maintenance. But what if IT teams could focus more on solving real problems instead of drowning in repetitive tasks? That's where automation steps in—a key innovation that's reshaping IT operations.

Using AI-driven, no-code automation, IT teams can eliminate tedious manual work, speed up response times, and improve overall efficiency. One of the biggest wins? Intelligent ticketing and auto-assignment. Instead of sifting through service requests one by one, automated systems can instantly categorize, prioritize, and assign tickets to the appropriate teams. This ensures issues are handled by the right experts and frees up IT staff to focus on actual problem-solving instead of just managing queues.

## AI-powered instant IT support

For many IT teams, handling routine queries—like password resets, account unlocks, and basic troubleshooting—can be overwhelming. AI-powered assistants can resolve common issues instantly, providing employees with real-time support without human intervention. The result? Employees get quick solutions, IT teams get more bandwidth, and the business runs more smoothly.

## Streamlining workflows for faster IT processes

Beyond ticketing and virtual support, workflow automation is revolutionizing IT operations. Many IT tasks, such as software requests, approval processes, and asset provisioning, involve multiple steps that can be slow and inefficient when done manually. With no-code automation, businesses can create streamlined workflows that ensure processes such as onboarding a new hire or handling offboarding happen seamlessly. This reduces manual effort, minimizes errors, and speeds up service delivery—keeping operations efficient and frustration-free.

## Proactive IT maintenance

One of the biggest shifts automation brings to IT operations is moving from reactive to proactive problem-solving. Instead of waiting for an issue to escalate, AI-powered systems can detect and resolve IT problems before they cause disruptions. Automated incident response can apply self-healing measures — like restarting services or adjusting configurations — helping businesses avoid downtime and keep everything running smoothly.

## Automation beyond IT

The benefits of automation don't stop at IT support. By integrating with other business functions such as HR, finance, and procurement, automation can streamline workflows across departments. IT teams can build automated processes for onboarding new employees, provisioning equipment, and managing compliance — eliminating silos and creating a more connected and efficient workplace.

For companies looking to scale efficiently, layering automation onto a knowledge management system (KMS) further strengthens the employee experience (EX). This ensures that knowledge is easily accessible and reduces the burden on IT teams.

The companies that succeed aren't merely working harder—they're strategically leveraging technology to unlock their full potential. IDC research underscores this transformation, revealing that [by 2027, 50% of SMBs will significantly adjust their IT budgets to accommodate AI technologies.](#)

One company leading by example is TaylorMade, a global golf equipment manufacturer. As it transitioned IT operations to the cloud, the firm faced a surge in service tickets. By implementing [Freshservice to automate core workflows](#), TaylorMade reduced ticket resolution time by 50%, improving IT efficiency and service delivery.

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First-call resolution is key. With Caddy, our Freddy AI-powered chatbot, most requests are fulfilled without human help.

**Ali Chitsaz**

**Senior Manager, Global Digital Workplace, Taylor Made**

# Optimize costs without sacrificing performance

Growing businesses often face the challenge of scaling with limited budgets. Unpredictable cash flow and increasing regulatory demands can further make sustainable growth feel like an uphill battle. The challenge is compounded by IT solutions that are often too expensive, too complex, or too limited in capability to support long-term success.

Enterprise-grade solutions, while powerful, come with hefty price tags and steep learning curves. Meanwhile, more affordable options often lack the scalability, IT-specific features, automation, and advanced AI capabilities that growing businesses need. Some tools take too long to set up, delaying impact, while others force businesses into rigid pricing structures that don't align with evolving needs.

Here are some things to consider while evaluating IT solutions for optimizing costs:

## Does it offer tailored pricing models?

Pay only for what you need with flexible pricing structures designed for growing businesses.

## Can it help you optimize resource allocation?

Track and manage IT and non-IT assets across the organization to eliminate waste and maximize efficiency.

## Does it ensure compliance without complexity?

Meet international regulatory standards seamlessly while keeping compliance costs under control.

## Can it deliver sustained ROI?

Drive long-term savings, ensuring IT investments deliver measurable business impact.

A prime example of cost-effective scaling is AG Barr, a leading beverage manufacturer. As the company sought to enhance IT operations while optimizing costs, it turned to Freshservice.

By automating key business operations, [AG Barr improved productivity](#), streamlined integration across teams, and enabled self-service capabilities without increasing IT overhead.

# Leverage AI to enhance IT capabilities

AI isn't just a buzzword anymore—it's a workplace necessity. [Seventy-two percent of employees](#) already trust AI to enhance their work, recognizing its ability to add tangible value to daily processes. This shift is especially evident in IT, where [36% of organizations have already adopted generative AI](#) use cases—more than any other business function. But AI goes beyond simply automating manual tasks; it's helping IT teams work smarter, faster, and more strategically.

## Going beyond automation

AI doesn't just eliminate tedious tasks but enables efficiency and innovation. Here's how IT teams are using AI to drive real impact:

### Predictive analytics

Anticipate trends, detect anomalies, and make data-driven decisions using historical insights.

### Performance optimization

Identify bottlenecks, improve system reliability, and enhance overall IT efficiency.

### Intelligent project management

Simplify workflows, streamline resource allocation, and improve project execution.

### Advanced threat detection

Advanced threat detection: Proactively identify and neutralize security threats before they escalate.

# From assistance to action

AI is becoming an active problem solver, going beyond just an assist to take action. Freshworks is leading this transformation through:

## Freddy AI Agent

Automates IT support, instantly resolving routine queries like password resets, access requests, and troubleshooting—without human intervention.

## Freddy AI Copilot

A smart AI partner that proactively assists IT teams by suggesting optimizations, detecting potential issues, and even automating workflows in real time.

These AI-driven solutions go beyond traditional automation, enabling IT teams to focus on complex challenges while AI handles the rest.

Whether it's streamlining operations, improving security, or enhancing decision-making, AI is transforming IT from a reactive function into a proactive, strategic powerhouse.

[Case in point, using the AI capabilities of Freshservice, the University of Aberdeen deflected 10,200 tickets and reduced the resolution time by 81%.](#)

[Y Combinator](#) predicts that vertical AI agents could be 10x bigger than SaaS.

# Scale IT operations with confidence and control

As businesses accelerate their digital transformation, the ability to scale IT operations has become a defining factor that separates market leaders from the rest. Without a scalable IT backbone, growth can quickly lead to inefficiencies, downtime, and skyrocketing costs. So, how can businesses ensure their IT operations keep pace with expansion?

## Comprehensive IT asset management

Scaling IT effectively starts with understanding and optimizing your existing resources. Traditional asset management often results in wasted resources, underutilized software licenses, and unnecessary spending—all of which hinder scalability. A smart, automated asset management system ensures IT teams can:

- Automate asset discovery to create real-time digital maps of IT infrastructure.
- Identify and reallocate underutilized resources—such as cloud instances—by adjusting provisioning automatically.
- Predict asset needs proactively, reducing unnecessary spending on new hardware and software.

## Advanced IT operations management

Traditional IT operations often rely on manual monitoring and reactive troubleshooting, leading to downtime, inefficiencies, and frustrated employees. Advanced IT operations management (ITOM) transforms IT into a proactive force, helping businesses:

Monitor service health in real time to detect performance degradation before it impacts users.

Automate alert management, prioritizing issues based on severity for faster response times.

Predict and prevent incidents before they happen, ensuring seamless IT operations as the business grows.

The result? Higher uptime, fewer disruptions, and IT that scales effortlessly with business demands.

## Future-ready IT infrastructure

A truly scalable IT operation isn't just about managing today's demands—it's about ensuring long-term flexibility. Future-proofing your IT infrastructure means investing in:

**Sandbox environments that allow IT teams to simulate growth scenarios, test system limits, and validate security frameworks before deployment.**

**Built-in audit logging for compliance, ensuring transparency and accountability across global regulations.**

**Automated system optimizations that adapt to evolving business needs, preventing bottlenecks before they occur.**

With a future-ready IT foundation, businesses can scale confidently without worrying about outgrowing their own systems.

## Scaling in action

Village Roadshow used [Freshservice to scale its IT operations](#) efficiently, achieving a 25% improvement in resolution time while saving on 60% of annual IT costs. Freshservice demonstrably scaled to manage over 2,000 IT tickets monthly, a significant improvement over the previous system, showcasing its ability to handle growing support needs.

# Bringing it all together

Lean EX is more than the sum of its pillars. It goes beyond simply streamlining processes. It is about cultivating a culture of efficiency and continuous improvement and proactively promoting a value-driven strategy within IT teams. It transforms IT from a tactical function to a strategic engine. As a result, IT employees can draw a link between their work and business goals, finding fulfillment and purpose.

For growing businesses seeking a reliable partner to power their Lean EX strategy, Freshservice offers a compelling solution. It is a modern, AI-powered, unified IT management platform that is refreshingly simple to deploy, implement, and maintain.

Freshservice enables IT and commercial business functions to scale with ITSM, ITAM, ITOM, and ESM solutions without the burden of high costs, complexity, or lengthy implementations that come with traditional tools.



# About Freshworks

Freshworks Inc. (NASDAQ: FRSH) provides people-first AI service software that organizations use to deliver exceptional customer and employee experiences. More than 73,000 companies, including American Express, Bridgestone, Databricks, Fila, Nucor, and Sony choose Freshworks' uncomplicated solutions to increase efficiency and loyalty. For the latest company news and customer stories, visit [www.freshworks.com](http://www.freshworks.com) and follow us on [Facebook](#), [LinkedIn](#), and [X](#).



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